

On-Line Charity Reporting: User Guide

You could make a
world of difference



On-Line Charity Reporting: User Guide

Welcome to Charitable Giving's Charity On-Line Reporting facility.

The facility is easy to use and designed to allow you to manage your report files, downloading as necessary as well as archiving and/or un-archiving/deleting files as required. Details of how to do this are set out in this User Guide. Good luck.

1. To access reports for your charity, first go to www.charitablegiving.co.uk and then:

The screenshot shows the homepage of CharitableGiving. At the top right are 'Contact us' and 'User Login' links. A blue callout bubble points to the 'User Login' link with the text 'Click on the User Login link'. Below the header is a navigation bar with links: About us, News, Payroll Giving, Options Accounts, 'Every Penny Helps', Corporate Services, Downloads, and Links. The main content area features a large green banner with the text 'So that's how you do it!' and a photo of an office environment. To the right is a 'Macmillan Cancer' section with a photo of a runner. Below these are four small images: basketball players, a doctor, a lifeboat, and a library. A large blue box on the left contains the text '3 ways to give' with three numbered options: 1. Payroll Giving (photo of two children), 2. Options Accounts (photo of a document), and 3. Every Penny Helps (photo of coins). At the bottom left is a 'News' section with a March 2010 article about payroll giving. On the right is a 'PayrollGiving@YourEmployer' section with a question mark icon and a link to find out more.

2. At the On-Line User Login screen:

The screenshot shows the 'On-Line User Login' page. At the top right are 'Contact us' and 'User Login' links. Below the header is a navigation bar with links: About us, News, Payroll Giving, Options Accounts, 'Every Penny Helps', Corporate Services, Downloads, and Links. The main form area has fields for 'Email address' (containing 'testchar1@charitablegiving.co.uk') and 'Password' (containing '*****'). A 'Login' button is to the right of the password field. A blue callout bubble points to the 'Login' button with the text 'Enter Email Address and Password, and then click on the [Login] button'. Below the form is a link 'Not registered to use our on-line services?' and a 'On-Line User Registration' button. At the bottom of the page is a footer with links: Home, About us, News, Charities, Employers, Employees, 'Every Penny Helps', Registered User Login, Contact Us, and Links.

3. After your Email Address and Password have been validated:

CharitableGiving
we make giving easy

About us | News | Payroll Giving | Options Accounts | 'Every Penny Helps' | Corporate Services | Downloads | Links |

Charity Reporting

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For additional security, please enter your Charity Reference below and press [Submit]:

Charity Reference:

Enter your **Charity Reference** and then press **[Submit]**

[Home](#) | [About us](#) | [News](#) | [Charities](#) | [Employers](#) | [E](#)

You will have received your Charity Reference(s) in the email confirming your registration and account activation

4. The **Current Reports** available for your charity will then be listed, the most recent first according to the format, YEAR_MONTH_CHARITY REFERENCE_CHARITY NAME, as shown below:

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we make giving easy

About us | News | Payroll Giving | Options Accounts | 'Every Penny Helps' | Corporate Services | Downloads | Links |

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The following reports are available for **download, archiving and deletion**.

Click the Download link against a report to save it to your own system. To archive or delete report/s check the relevant box/es and use the drop down facility below.

Current Reports

<input type="checkbox"/>	Filename	
<input type="checkbox"/>	2011_11_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_10_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_09_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_08_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_07_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_06_9991_Test Charity 1.xls	Download

Action

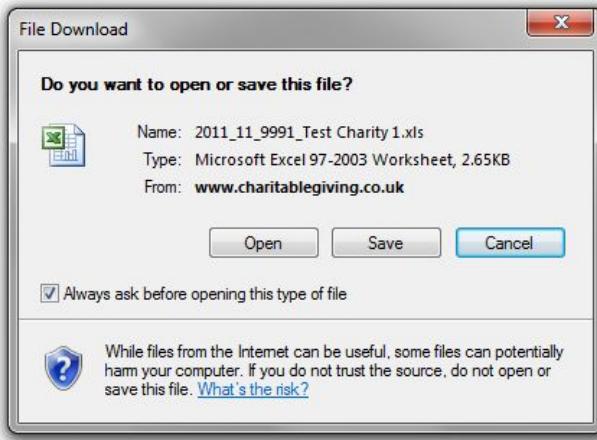
Archived Reports

[Home](#) | [About us](#) | [News](#) | [Charities](#) | [Employers](#) | [Employees](#) | ['Every Penny Helps'](#) | [Registered User Login](#) | [Contact Us](#) | [Links](#)

5. Files can be downloaded one at a time. To **Download** a file:

The screenshot shows the Charitable Giving website's 'Charity Reporting' page. At the top, there's a navigation bar with links like 'About us', 'News', 'Payroll Giving', etc. On the right, there are 'Contact us' and 'User Login' buttons. The main area is titled 'Charity Reporting' and shows a list of 'Current Reports'. Each report entry has a checkbox next to the filename and a 'Download' link to its right. A large blue callout box with the number '1.' is positioned above the first report, pointing to the 'Download' link. Another blue callout box with the number '2.' is positioned below the first report, also pointing to the 'Download' link. Below the report list, there are 'Action' and 'Archive' buttons, and a 'GO' button.

6. The **File Download** dialog will then be displayed, as shown below, and you can **Open** or **Save** the file as required



Other files can then be downloaded in the same way and downloaded files remain in the list of files under **Current Reports** until moved to **Archived Reports** or **Deleted**.

Please note, however, that to conserve space files older than 180 days will be deleted automatically; if you require a report that has been removed, please contact Charitable Giving and there may be an additional charge for this service.

7. To view any **Archived Reports**:

The screenshot shows two tables side-by-side. The top table is titled 'Current Reports' and lists six files from June to November 2011. The bottom table is titled 'Archived Reports' and lists three files from March to May 2011. Both tables have columns for 'Filename' and 'Download'. Below each table is an 'Action' dropdown menu with options like 'Archive', 'Unarchive', and 'Delete', followed by a 'GO' button.

Current Reports		
<input type="checkbox"/>	Filename	
<input checked="" type="checkbox"/>	2011_11_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_10_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_09_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_08_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_07_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_06_9991_Test Charity 1.xls	Download

Archived Reports		
<input type="checkbox"/>	Filename	
<input type="checkbox"/>	2011_05_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_04_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_03_9991_Test Charity 1.xls	Download

8. Any number of **Current Reports** can be archived as a batch by:

This screenshot illustrates the steps to archive multiple files. A large blue callout points to the 'Archive' option in the dropdown menu of the 'Current Reports' table. The dropdown also includes 'Unarchive' and 'Delete' options. The 'GO' button is highlighted in the callout. The 'Archived Reports' table below shows the same files now listed under 'Archived Reports'.

Current Reports		
<input type="checkbox"/>	Filename	
<input type="checkbox"/>	2011_11_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_10_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_09_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/>	2011_08_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/>	2011_07_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/>	2011_06_9991_Test Charity 1.xls	Download

Archived Reports		
<input type="checkbox"/>	Filename	
<input type="checkbox"/>	2011_05_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_04_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_03_9991_Test Charity 1.xls	Download

Alternatively, files can be similarly deleted from the **Current Reports** list by selecting the **Delete** option instead.

9. In a similar manner, files can be moved from **Archived Reports** to **Current Reports** using the **Unarchive** option followed by [GO] having selected the required files as before:

This screenshot shows the 'Archived Reports' table with three files selected. A blue callout points to the 'Unarchive' option in the dropdown menu. The 'Unarchive' option is highlighted in the callout, along with the 'GO' button. The 'Current Reports' table below shows the same files now listed under 'Current Reports'.

Archived Reports		
<input type="checkbox"/>	Filename	
<input type="checkbox"/>	2011_05_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/>	2011_04_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/>	2011_03_9991_Test Charity 1.xls	Download

Current Reports		
<input type="checkbox"/>	Filename	
<input type="checkbox"/>	2011_05_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/>	2011_04_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/>	2011_03_9991_Test Charity 1.xls	Download

10. It is worth noting that when using the **Archive**, **Delete**, and **Unarchive** functions, all files can be selected by:

Welcome, Test Charity 1

The following reports are available for download, archiving and deletion.

Click the Download link against a report to save it to your own system. To archive or delete report/s check the relevant box/es and use the drop down facility below.

Current Reports

<input checked="" type="checkbox"/> filename		
<input checked="" type="checkbox"/> 2011_11_9991_Test Charity 1.xls	Download	
<input checked="" type="checkbox"/> 2011_10_9991_Test Charity 1.xls	Download	
<input checked="" type="checkbox"/> 2011_09_9991_Test Charity 1.xls	Download	
<input checked="" type="checkbox"/> 2011_08_9991_Test Charity 1.xls	Download	
<input checked="" type="checkbox"/> 2011_07_9991_Test Charity 1.xls	Download	
<input checked="" type="checkbox"/> 2011_06_9991_Test Charity 1.xls	Download	

Action [Archive](#) ▾ [GO](#)

Archived Reports

[Home](#) | [About us](#) | [News](#) | [Charities](#) | [Employers](#) | [Employees](#) | ['Every Penny Helps'](#) | [Registered User Login](#) | [Contact Us](#) | [Links](#)

11. When you have finished your session, you can logout by:

Charity Reporting

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The following reports are available for download, archiving and deletion.

Click the Download link against a report to save it to your own system. To archive or delete report/s check the relevant box/es and use the drop down facility below.

[Logout](#)

Clicking on the Logout link

Additional copies of this User Guide can be obtained from:

www.charitablegiving.co.uk > Downloads > Literature